Meta: This guide will help your agency provide strategic guidance and implementation services that set your clients up for long-term success on the Okendo platform.

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Title tag: How to Get Your Clients Started on the Okendo Platform
URL: /implementation-guide-agency-partners

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Create a New Revenue Stream for Your Agency with Okendo

As Okendo continues to scale worldwide, there's nothing that instills more pride in us than witnessing the success of our agency partners. We strive to play a role in helping you and your clients enjoy the maximum benefits of integrating and utilizing our offerings.

We score tremendous joy in watching our partners establish new streams of revenue through the use of Okendo [Reviews] and [Surveys] – and we don't want it to stop. Which is why we believe it's important for us to provide our partners with regular guidance and support, so they can grow their service offerings using Okendo.

In this guide, we'll take you step-by-step through the process of building a billable Okendo program at scale. By providing tips for an optimized merchant set-up with the expected hours allotted per step, this guide will help your agency provide strategic guidance and implementation services that set your clients up for long-term success on the Okendo platform, while also empowering your agency to boost your revenue and financial health.

Okendo Implementation Overview

Reviews (11-26 billable hours):

- Global Design Setup (1 hr)
- Widget Design (3-5 hrs)
- Review Capture (1 hr)
- Review Generation (3-8 hrs)
- Maximize Reviews Impact Across Website (2-3 hrs)
- Maximize Reviews Impact Across Marketing Strategy (1-8 hrs)

Surveys (3-4 billable hours per survey):

- Define Objectives (30 minutes)

- Survey Design (1-2 hr)
- Survey Distribution (30 minutes)
- Sync Survey Data (1 hr)

Okendo Reviews

STEP 1: Global Design (Time to Implement: ~1hr)

After opening up the Okendo app, the first thing you'll want to do is to make some basic initial design choices regarding the reviews widget. At this stage, it's best to keep it simple, limiting your design work to the selection of a font style and color palette using the Auto Style feature:

Click ***Displays*** in the sidebar > Choose the ***Reviews Widget*** option > Click the ***Style*** tab and choose the ***Auto Style*** option

Once you have the Auto Style tool pulled up, you'll select Brand, Primary Text, and Secondary Text colors by clicking the hex code field and using the color picker.

Click ***Accept and Fill*** > Click ***Save Changes***

Okendo will automatically generate a unique color palette based on your three sections and apply them to your reviews widget style settings.

At this stage, you won't be doing any advanced styling, so focus only on selecting colors that align with the merchant's brand design and aesthetics. If the results aren't to your liking, or you'd like to make some slight adjustments, the auto-generated colors can be modified at any time.

Need more Global Design support? Click here.

STEP 2: Widget Design (Time to Implement: ~3-5hrs)

When you're designing reviews widgets, it's important to do so in a way that optimizes the display of your highest impact reviews. This means ensuring the most valuable, in-depth, and content-rich feedback is clearly visible to prospective shoppers. This helps brands build trust around their customer's products and can ultimately lead to higher conversion rates.

Okendo provides 7 different widget display templates to choose from, and each template can be customized using the Style Editor to highlight what's most important to the brand. Relevant display features include:

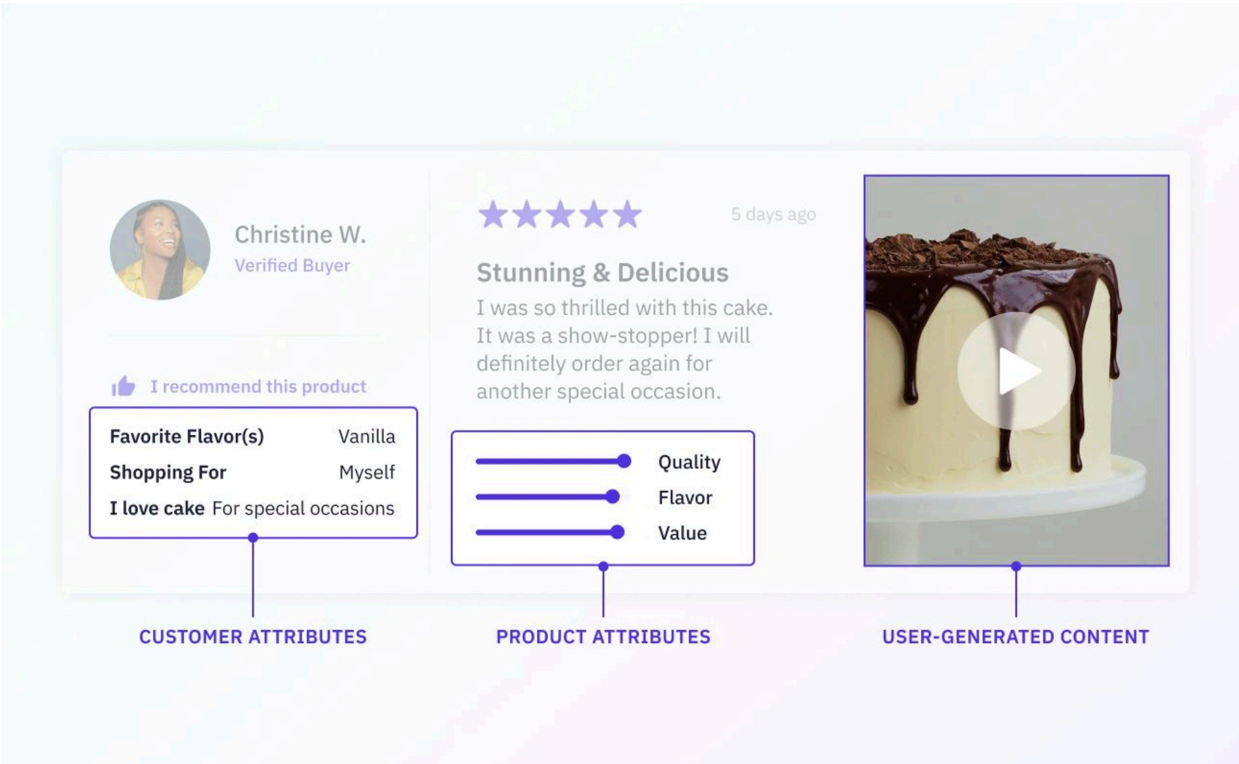


Photo & video. Support user-submitted photo and video content to provide social proof and build trust among new shoppers.

Product attributes. Drive home the main value proposition of your product by asking customers to rate the product's performance on [a range or centered range scale].

Customer attributes. Add a touch of personalization by including unique [customer attributes] such as age, hair color, or relevant demographic information as part of the review process. This will allow new shoppers to search and access reviews from similar customers, while also allowing you to collect actionable zero-party data that can be used toward personalized marketing campaigns and promotions.

Q&A. Provide fast and straightforward answers to frequently asked questions by adding a Q&A section to your review template, or by installing a [standalone Q&A widget] to the location of your choice.

In order to determine which widget works best for your client, you'll first need to consider what such a review looks like in the context of their brand. For example, if your client is in the apparel industry, it may be most important to emphasize user generated content (UGC) highlighting the item's appearance, as well as customer attributes like demographics and sizing information. On the other hand, if your client is a food or beverage company, it may be better to prioritize the display of product attributes, such as taste, quality, and sweetness factors.

For recommendations on attributes for our most popular verticals, please refer to the articles below:

- Fashion & Apparel
- Skincare
- Beauty
- Accessories
- Food & Beverage
- Shoes

Need more Widget Design support? Click here.

STEP 3: Review Capture (Time to Implement: ~1hr)

Now that you've designed the reviews widget for your client, the next step is to set up and design the review capture form. This is what customers will interact with when submitting a review, so it's crucial to design your capture form in a way that allows for, and even incentivizes, high impact reviews.

If you've set up global styling in the Okendo app, then the review capture form will already be pre-styled per Okendo's default. If you decide you'd like to style the form independently, you can always do so using the Auto Styling feature or exploring Enhanced Style Settings.

Collecting Additional Customer Attributes

In addition to the publicly displayed attributes included in the reviews widget, there may be some customer attributes that your merchants want to collect without displaying them directly on their website. For example, information like a reviewer's birthday can be used to power personalization, but you wouldn't want to show this to other customers. To collect these attributes, leave them out of the reviews widget and add them to the review capture form instead.

Leveraging Incentives

Incentivizing customers to leave a review is an incredibly effective way to encourage the maximum amount of feedback, and this feature can easily be integrated into the review capture form. Moreover, if you've already established an incentive strategy with your client, setting up incentives should only add around 10 extra minutes to the process. If you haven't already discussed incentives, work with your client to determine what makes the most sense based on their unique goals and financial output. This would add additional billable hours on top of the implementation and design of the review capture form for your consultative services.

For example, you might explore tiered incentives, which reward customers with digital coupons in exchange for higher quality reviews, such as those featuring photo or video content, and can be set up natively through Okendo.

Alternatively, clients may choose to offer loyalty points or store credit, which can be configured seamlessly through an integration with one of Okendo's loyalty partners, including LoyaltyLion, Eber, Smile.io, or Rise.ai.

Ask for Site Reviews

Scaling your reviews strategy doesn't just mean collecting product reviews. But they can act as a gateway for brands to engage shoppers in other ways, including encouraging them to provide feedback for other aspects of the ecommerce experience.

For example, after a customer submits a product review, you might ask them to provide a site review, too, on the Post-Review page. Site reviews establish the rating aggregate which can be used for a brand's Google Seller Ratings.

Using Okendo, you can configure the Post-Review page to include the Site Review module, which asks customers to rate their experience at your store after they submit their reviews. Indeed, we enable all customers to leave both a product review and a site review.

STEP 4: Review Generation (Time to Implement: ~3-8hrs)

Now that you've done some quality design work, it's time to focus on how your clients send review requests directly to their customers. This is called your Review Request Sequence, an email and/or SMS based process that can be configured based on your unique review generation strategy, as well as the individual preferences of customers.

Email Review Requests

Email review requests can either be sent using Okendo's native email feature, or through an integration with one of our partner providers, and the right option will depend largely on your merchant's existing tech stack. Okendo's native email tool comes with a variety of easy-to-design templates, and can be customized to reflect the brand's style and tone using the Style Settings feature.

For brands utilizing one of our partner providers (Klaviyo, Attentive, Omnisend), taking advantage of the integration is an alternative option. Using an integrated partner allows agencies to create review request messages that are consistent, on-brand communications. Based on the complexity of the brand's email designs, you can bill them at a similar hourly rate as you have for the rest of their email program to set up the Okendo review request sequence.

SMS Review Requests

Some customers may prefer to be reached through SMS or mobile communications, and while the Okendo platform does not currently have its own native feature for mobile outreach, we offer integrations with all of the above listed providers, in addition to Postscript, an SMS-only platform.

To learn more about how to integrate Okendo with one of our supported ESP or SMS providers, visit the following links:

Okendo X Klaviyo Integration
Okendo X Attentive Integration
Okendo X Postscript Integration
Okendo X Omnisend Integration

Best Practices

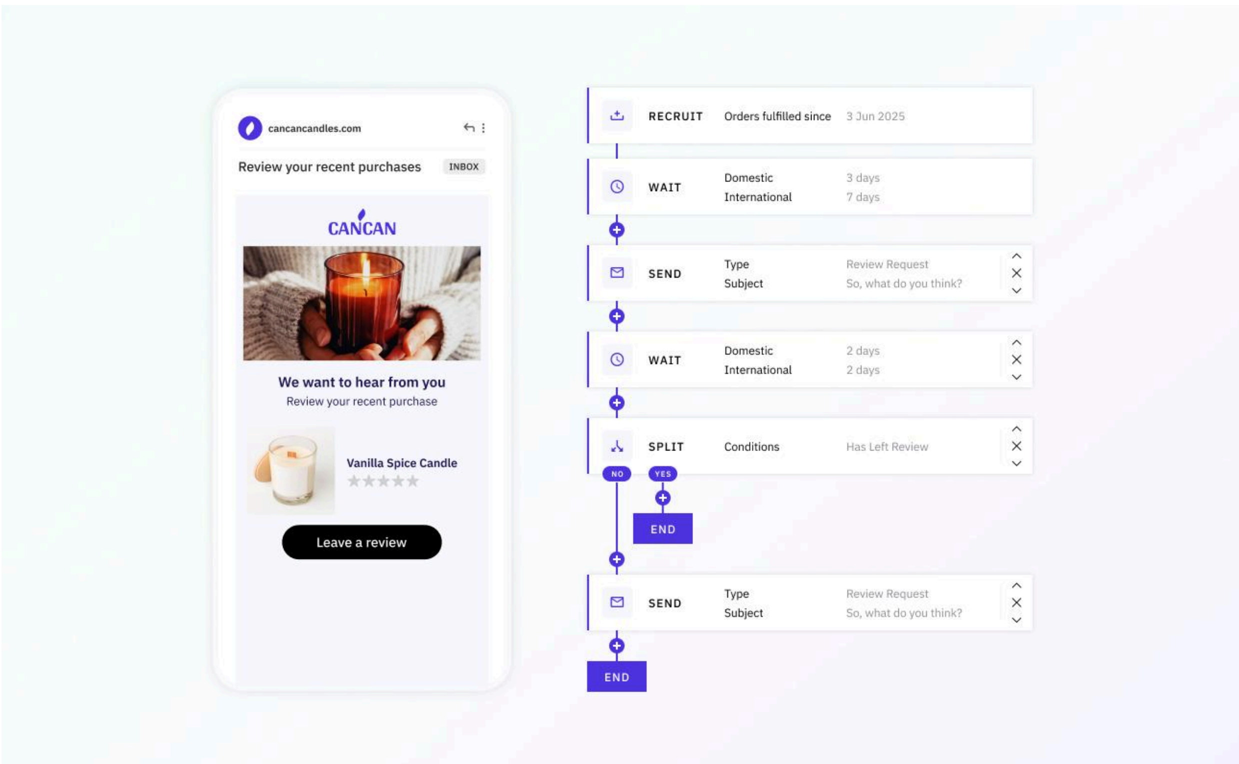
Whether you leverage SMS or email to issue review requests, here are some best practices to help you maximize engagement:

Send review requests based on the customer's preferred channel

If your client is using a combined ESP/SMS platform such as Klaviyo, you have the ability to split the delivery channel in the review request sequence. For example, if a customer is opted in to receive SMS messages from the brand, the review request may be better suited to be delivered via SMS. However, customers who have not opted in can still receive their review request via email.

Send review requests based on delivery date

With Okendo, you can send a review request a certain number of days after an order has been delivered to ensure customers have received their products before being asked to leave a review. All you need to do is configure the wait time to “after delivery” on the sequences page. To ensure the delivery date of the order is being used you must be tracking your packages through Shopify or Okendo's AfterShip integration.



Set up review requests with reminders

You can also create a sequence to remind customers via email to leave a review. In general, you want your reminder email to feel the same as the initial review request email, but a good idea is to tailor it to context with a different subject line and body text.

Review requests with reminders for media

Similar to the above, you can also send your client’s customers a reminder to add media to strengthen their review. Here, you would leverage the "Review Request With Photo Reminder" sequence template which allows you to customize two initial “review request” emails and then an “add media” email type.

Clearly communicate incentives for review completion

It's not enough to just offer shoppers an incentive for leaving a review. It's imperative that you efficiently communicate the existence – and lure – of these incentives to maximize review responses. Make sure this information is clearly visible when prompting customers to leave a review via email or SMS.

Pro tip: The most important action here is for your customer to complete their review. Remove any ancillary CTAs, like *Shop now* or even social handles so there are no distractions.

For additional review generation support and best practices, visit our article on post-delivery review requests as well as our extended email usage guide.

STEP 5: Maximizing the Impact of Reviews Across Your Client's Site (Time to Implement: ~2-3hrs)

While reviews will be styled based on the global design default settings, it's important to implement them across your merchant's website in a way that maximizes their overall impact on conversion and AOV. When deciding which widgets to include and how to utilize them, consider the following strategies along with your client's unique needs and expectations:

Add media grids or carousels to increase the visibility of high impact reviews. Photos, videos and other UGC are invaluable assets when it comes to building trust and maximizing the impact of reviews. Consider bringing UGC to the forefront by adding an interactive media grid or media carousel to accompany reviews displayed across the site.

Set up a dedicated reviews page to optimize search results. Customers should have a convenient place to browse reviews on your merchant's website, so be sure to set up a dedicated reviews page that's easy for any new customer to find when searching, *"[brand name] reviews"*. Additionally, consider incorporating a text search feature that allows customers to locate specific reviews and product categories efficiently.

Group multiple reviews on a single product page. Grouping reviews from multiple products together is another great tactic for building confidence among consumers. This can be particularly helpful for brands offering bundled or variety-pack products, as well as bringing credibility to a product that may be new or have less reviews than similar items.

For more ideas on how to maximize review displays across your merchant's website, check out this article on increasing conversion rates.

STEP 6: Maximizing the Impact of Reviews Across Your Client's Marketing Strategy (Time to Implement: ~1-8hrs)

In addition to optimizing reviews displays throughout the website, it's critical to maximize the impact of reviews across your client's marketing strategy wherever possible. This means optimizing everything from their email and SMS strategy, to how their reviews and product advertisements appear on search engines and social media platforms. By implementing a reviews strategy outside of the Okendo platform, your agency has the opportunity to provide more strategic value to your merchants and boost their ROI for Okendo beyond the product detail page.

Here are a few Okendo features and best practices to consider. Each recommendation is a unique implementation that represents more potential billable hours for your brand.

Syndicate reviews to Meta and Walmart. Syndicating reviews, particularly those containing UGC, is an effective way to spread social proof and get more eyes on your merchant's products. Consider tapping into Okendo's Meta integration to bring review visibility to Instagram and Facebook Shops, as well as our Walmart syndication program, to enhance product listings and drive up conversions.

Add star ratings to Google Shopping ads and Google Seller Ratings.
Adding reviews and star ratings to product advertisements can have a positive impact on your overall ad performance. We've made this easy to do with our integrations with Google Shopping and Google Seller Ratings.

Add star ratings to abandoned cart and upsell/cross-sell emails. Social proof is an important conversion driver at critical stages of the buyer journey including abandoned carts & upsell/cross-sell opportunities. Dynamically pull in aggregate ratings or review blocks to make a stronger impact on conversion for these critical touchpoints.

Leverage zero-party customer data from attributes in personalized communications. As mentioned previously, the customer attributes collected through product reviews can be used to segment customers based on shared characteristics, behaviors or preferences, and ultimately to power personalization. Fortunately, it's now easier than ever to introduce Okendo data into your segmentation strategy using the Klaviyo and Attentive integrations.

Check out this example of how Slate Milk used the data from Okendo's customer attributes to send targeted emails for driving repeat purchases.

Ask 5-star reviewers to refer a friend.
Send customer referral requests via email or SMS to satisfied buyers who leave 4 or 5 star reviews. By asking satisfied customers to refer a friend, brands can capitalize on positive word-of-mouth to drive income by turning happy customers into brand advocates.

Give your customer service teams access to customer reviews.
Okendo allows you to take a number of unique approaches to harmonizing email and customer service communications, including streamlining review moderation and customer service through our Gorgias integration. By giving customer service teams insight into customer review data, they can proactively respond to negative reviews and resolve any issues that arise with previously satisfied customers.

Okendo Surveys

STEP 1: Defining Your Client's Objectives (30 min per survey)

Before you can get your clients started on Okendo Surveys, you'll need to identify what kind of information they'd like to discover.

Surveys questions come in various types and have various use cases, so which surveys your client uses will depend on their unique objectives. However, one of the benefits of Okendo Surveys is the ability to collect continuous insights with multiple surveys running at the same time. **At a minimum, DTC brands should always be collecting customer insights around marketing attribution and NPS**. Okendo supports multiple survey use cases should a brand want to collect any additional insights.

Survey Use Case	→	Insights to Gain
Marketing Attribution	→	Ask customers "How did you hear about us?" at the time of purchase to learn which marketing channels are performing best and optimize marketing budget accordingly.
Customer Experience Management	→	Measure brand loyalty and customer satisfaction with best-in-class frameworks such as NPS, CSAT, and CES.
Profile Enrichment	→	Enrich customer profiles with zero-party data including identity, demographic, preference, behavior, and intent in order to power more personalized experiences.
Conversion Rate Optimization	→	Discover conversion drivers and blockers, measure their impact on buying behaviors and monitor the impact of CRO experiments and website changes.
Market Research	→	Stay ahead of the game with the latest insights into market trends, consumer behaviors, and competitive landscapes.
Audience Acquisition	→	Acquire qualified shoppers by converting consumer audiences from social media platforms into marketing contacts that you own with their consent.

STEP 2: Survey Design (1-2 hr per survey)

Now that you've zeroed-in on exactly what your client wants to learn, it's time to start building out surveys.

It only takes two easy steps to create an Okendo survey:

Choose a template and create your survey

Okendo Surveys accelerates survey creation by providing a number of ready-to-use and customizable templates, while also providing the option to clone an existing survey or simply build one from scratch.

To choose a template, click **Surveys** on the sidebar in the Okendo app, choose **+Create New** on the Survey List page, and select an option such as "Blank Template," "Net Promoter Score (NPS)," or "Attribution Survey," among others.

From here, you can begin creating your survey by selecting from a range of question types and entering your questions into the template.

Add conditions to your survey questions

While it's possible the survey you've created is ready to be delivered to customers, there may be instances where you'd like to add conditions to individual questions in order to learn more about the customer's response. For example, if a customer provides a low NPS score, you can ask them a second conditional question to gain additional insights into the customer's problem.

To add conditions to survey questions, your survey must have at least two questions. Click the **Add Condition** button, and begin defining conditions to maximize the generation of customer insights.

Pro-tip: Okendo recommends asking 3-5 survey questions in order to maximize survey responses without risking an interruption to the user experience.

Enable Contextual Targeting

With Okendo's contextual targeting feature, your clients can determine rules on when and how surveys are delivered to certain customers. More specifically, this feature ensures that surveys are sent in reaction to real data, whether it's the preferences of a customer segment, or the actions of a customer in real-time.

This not only improves engagement rates, but it also removes the frustration of sending duplicate surveys to the same customer, or delivering surveys that simply aren't relevant to a customer's experience. This is especially important if your clients are running multiple surveys on the same channels at the same time.

STEP 3: Survey Distribution (30 min per survey)

After you configure a survey, you're ready to decide on how you're going to get the surveys out to customers.

With Okendo Surveys, you can easily distribute them using the following four channels:

Post-checkout. Utilizing surveys post-checkout is an effective way to capture customers at a high-point of engagement to learn where they came from, reveal bottlenecks in the buying process, and more.

On-site. Prompt shoppers with quick, in-the-moment microsurveys directly on your client's website to gain real-time insights into the customer experience.

Sharable link. By converting a survey into a shareable link, it becomes easy to distribute efficiently across multiple platforms, including email, SMS, and social media networks.

Post-review. Whether customers liked or disliked the product or experience, presenting them with a survey immediately after they complete a review allows them to expand on their feedback, giving you additional insights into the factors that informed the review.

Offer incentives for survey completion

Additionally, similar to Okendo Reviews, your clients may choose to offer an incentive to increase survey completion rates. Okendo Surveys allows brands to set up a Shopify coupon code for a dollar or percentage amount off the customer's next purchase, configured at the survey level.

When adding a survey to the distribution channel in the Okendo app, you will be prompted to configure the chosen incentive, if any. The unique coupon code will be added to the outro page at the end of the survey and will also be emailed to the customer.

STEP 4: Syncing Your Client's Survey Data (1 hr per survey)

Data generated from Okendo Surveys can be used to create targeted audience segments in Klaviyo and Attentive. While the sync may take 1 hour per survey, **each email design can add up to an additional 3 additional hours per email.**

Here are some best practices for utilizing different survey data to build smarter campaigns.

Leverage zero-party customer responses to power personalization.
Similar to the insights collected with customer attributes, any zero-party data collected through survey responses can be used to segment customers or create 1:1 personalized email or SMS communications.

Ask NPS promoters to refer a friend.

Set up an email or SMS communication asking anyone who answers 9 or 10 on an NPS survey to refer their friends to your client's brand.

Conclusion

As demand for high-quality ecommerce experiences heats up, skilled agency partners are critical to help merchants grow their online businesses. We built this guide to not only assist our partners in transforming how their clients engage with shoppers online, but to bring new revenue-generating opportunities to the table for our partners, too.

Indeed, we're proud to work with our partners to help maximize the use of Okendo Reviews and Surveys as part of their billable programs. If you're looking to onboard new clients to Okendo to produce more revenue, check out our recent blogs that dive into what to look for in a customer reviews and surveys provider.

Have additional questions about any of the above strategies, or simply want to learn more about how to set your customers up for success on the Okendo platform? Feel free to reach out to your Partner Manager, or email partners@okendo.io and we'll be happy to help.

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